Every day, members of Congress and federal employees make decisions that affect our business. The goal of the DTA Washington Advocacy Program is to use our resources to influence those decisions so that the outcomes are positive for both the dental community and the dental market.

Influencing policy decisions requires establishing quality relationships with decision-makers and providing accurate information. As an organization, DTA commits resources to further our goals in Washington, but our most critical assets are you, our member, and your efforts on behalf of the DTA.

The most effective way to influence policy making is to establish an ongoing relationship with our nation’s decision-makers, providing your knowledge and expertise on the dental industry and the issues we face. Elected officials rely on their staffs for information but they want to know how their constituents feel about issues. They respond to knowledgeable people from “back home.”

Building a Relationship with Your Member of Congress

There’s a tendency to communicate with our members of Congress only when an issue arises that we don’t like or a law is passed that negatively affects our industry. Relying on this communication approach puts us in the position of bringing “too little, too late” to the table. It is important to build an on-going relationship with your elected officials so you can be involved in issues as they develop. That means taking a positive step to introduce yourself, offer your expertise and become a reliable source of information to your elected officials. By doing this, they will come to rely on your opinion. Remember, legislators and their staffs are not experts on every issue. They rely on input from knowledgeable constituents to inform their opinions on legislation and policy. Therefore you want them to consider you a valuable resource.

Getting Started – How Do I Communicate with my Legislator?

A legislator’s day is generally very busy with appointments scheduled all day long, from breakfast meetings to committee meetings to afternoon votes and evening fundraisers. Because of this it may be difficult to reach your legislator and their staff by phone. Likewise, for security reasons, all congressional mail is sent to a facility separate from Capitol Hill and irradiated to kill possible toxins. Sending a letter via FedEx or UPS will also be intercepted by the Congressional Post Office and sent out for irradiation.

E-mail May Be Preferred Communication

As a result of these barriers to traditional communication methods, e-mail is typically the preferred form of communication among legislators and their staffs.

The keys to writing an effective e-mail are simple:

- Personalize the message as much as possible. Personalization may mean your message will be given closer attention. Form letters or e-mail blasts don’t carry as much weight.
- Get to the point. Remember, each staffer is dealing with a large volume of e-mail. Try to confine yourself, if possible, to no more than one or two issues. Explain your position as clearly as possible. If the issue is complicated, attach additional material; if the reader wants more information, he can read the attachments. Also, include your telephone number so he or she can call you if you have piqued their interest.
- Share your personal experience. Use real-life examples to illustrate your points.
- Limit any formatting. You need to consider that e-mail is now often checked using a Blackberry, iPhone or similar device. It is therefore important to keep the format of the e-mail as simple as possible. Do not include extraneous graphics or signatures.

Social Media

More than 80% of members of Congress have social media accounts such as Facebook and Twitter. You can connect with legislators online to see what issues are most important to them and share your views. Conversations about what is happening in your community are happening online and social media tools give you an opportunity to participate in the dialogue to make sure your voice is heard.

Reaching Out by Phone

From time to time you may need to reach out by phone, if a matter is urgent. Here are a few tips:

- Get straight to the point. Explain who you are and why you are calling.
- Do your homework. Make sure you have your facts straight and your talking points ready. You may only have a few minutes to get your point across.
- Be ready to answer questions. Don’t expect a one-sided conversation. Anticipate questions your legislator or staff member could ask you and have answers. If you’re asked a question to which you don’t know the answer, say you don’t know but offer to follow up and then follow through on your promise.
- Follow up your conversation with an e-mail referencing your conversation, reiterating your points, providing any additional information you promised and thanking them for their time.
Scheduling a Personal Visit

Scheduling a personal visit in the legislator's district or state office, or at their Washington, DC office, is an effective way to introduce yourself to your legislators and the key members of their staff with whom you will most frequently interact.

When you contact the office of a representative or senator to request a meeting, you'll probably speak to his or her scheduler. Explain who you are, the organization you represent and the purpose of your meeting request – to introduce yourself, and your organization, to the legislator. If you know anyone on the legislator's staff, they may be able to assist you in setting up a meeting. Also consider asking to schedule meetings with any pertinent staff, such as the legislative assistant tasked with tracking business or health care issues that pertain to your business, or the chief of staff.

A few tips to make setting up a meeting go smoothly:

- Check www.thomas.loc.gov for the current congressional calendar to determine when your legislators will be in their district office and when they will be in session in Washington.
- Be flexible on the timing. Remember, legislators are juggling priorities and have busy travel schedules. Many travel frequently between their district office and Washington and may be more available to meet with you in their district or state. Others travel infrequently due to distance or committee responsibilities and may have limited availability to meet outside of designated district work periods. Be as flexible as possible with your time in order to make the most of theirs.
- Explain the purpose of the meeting and how long it will take. If you need 20 minutes, ask for 20 minutes. Don't ask for more time than you need.
- After you've scheduled a meeting, send an e-mail to the scheduler or other relevant staff member confirming the date and time. This reduces scheduling errors and helps make your visit more visible.

Preparing for Your Meeting

Learn about the individual legislators and staff. Gather information on their biographies, personal interests, stances on issues, and any bills or resolutions they have sponsored in the past. Also educate yourself about their districts (e.g., location, major industries or employers, rural or urban).

Finally, note their committee assignments and any leadership roles. Much of this information should be available on their websites. Try to find ways to connect with him/her on a personal level (e.g., if your children went to the same high school or if you have the same alma mater, mention it).

You made it to D.C. - Now What?

Everyone in your group should be neat and well groomed. Business attire is appropriate. However, don’t be surprised if the staff is dressed casually.

On the day of the meeting, show up early and come prepared with background materials about your organization – its size, history and role in your community. Bring extra copies for staff, as well as multiple copies of your business card. Also, ask for staff member’s business cards and whether they prefer to be contacted by phone or e-mail.

At the meeting, begin by introducing yourself and your organization. This is an opportunity to share your organization's story. Talk about the products/services you offer, your employees, and the economic impact you have on the community at large, such as vendors and other service providers, as well as local businesses. Invite your legislator and his or her staff to tour your business when they are back in their home office in order to learn more about the work you do and to meet your employees.

- Time your arrival. Congressional offices in Washington are hectic. Legislators may be late due to many things beyond their control. Never show up unannounced. All in-person meetings must be scheduled in advance. Show up to your meeting no more than five to ten minutes early, but most importantly, DO NOT BE LATE!
- Expect any meeting you set up to last at least ten minutes and no more than thirty minutes, depending on the staffer’s availability.
- Anticipate last minute changes. Schedules frequently change due to unscheduled votes and committee hearings and you may end up meeting with a different staff member. If this happens, speak to the staff member as you would someone who is not familiar with the issues important to your business.
- Meeting space is at a premium on Capitol Hill, so don’t be surprised if your meeting takes place in the hallway or in an office with several people sharing space.
- Staff members directly advise the member of Congress and their time is stretched thin across many issues. Make sure you convey all information clearly, and directly state what you would like the member of Congress to do (support a particular policy, co-sponsor or oppose a certain bill, sign a congressional letter, join a certain caucus, etc.).
- Stay on topic and avoid extraneous subjects that will distract the staffer from the true issue at hand. If you want to discuss other matters, do so at another time.
- Paint a clear picture of how the Member of Congress' constituents are directly affected by the matter. Staffers and members of Congress are much more likely to take notice of issues that have a clear relation to and impact on their district or state.
- Do not allow the meeting to last longer than the amount of time originally agreed upon, unless the staffer encourages it. If a staffer feels like his/her time is being encroached on or wasted, they will be less likely to speak with you in the future.
- Send a follow-up e-mail thanking the legislator and/or staff for meeting with you and expressing your desire to work together in the months and years to come. This is also a good opportunity to repeat your invitation to tour your business. And don’t forget to thank the scheduler who arranged the visit for you. Schedulers are the gatekeepers for legislators' calendars.
Nurturing the Relationship

A strong relationship needs to be nurtured and maintaining a dialogue is essential. Now that you’ve met your legislator and key members of his or her staff, continue to reach out to them on a regular basis with meaningful information about your company, its activities and successes.

Tips for Giving a Tour of your Business

An “on site” tour provides the opportunity to familiarize your legislator (or his or her staff) with what you do and the challenges you face.

The purpose of the tour should be informative, not political. Be patient with the scheduling; it may take some time to fulfill a time-intensive and not time-sensitive request like a tour. But also be persistent so they understand this is important and you won’t simply “go away.”

Legislators are eager to interact with their constituents during congressional recesses. Recesses generally occur the weeks before or after a major federal holiday and in the month of August. Check www.thomas.loc.gov for the latest congressional calendars. A standing invitation to tour your facility during the month of August or other major congressional recesses would increase the likelihood of the legislator accepting the invitation.

Once a date has been set, you’re ready to plan a successful and productive visit. Here’s a list of things you may want to keep in mind:

- Prepare a factsheet about your business. Include important information such as products and/or services provided, what end user groups you serve, number of personnel, other locations, awards/accomplishments, information about key people within your organization and interesting facts. You can send a factsheet by e-mail in advance of the meeting as this will give your legislator and his or her staff a quick and easy overview of your organization.

- Arrange for a photographer if you want photos of the visit for your internal communications. Determine if press will be allowed into your facility. Check with the legislator’s office to see if they plan to notify the press of the visit. If you don’t want the press involved, then tell your legislator that press is not allowed. If you agree to allow the press in, make sure your legislator’s office understands this tour is an opportunity to learn more about your organization and not a campaign opportunity. Assign an employee to work with the press and determine in advance what parts of the visit, if any, are off-limits to the press.

- Notify your staff of the tour’s date and time. Make sure your employees are aware of the legislator’s visit and the purpose for the visit – getting to know your organization, the great work you do, and the challenges you face as you go about this work. Emphasize that this is not a political or campaign visit but a chance for your organization to spotlight the great work they do every day.

- Set aside a secured place for your guests to make a phone call, check their e-mail or relax for five minutes before the tour begins. An uncluttered office or conference room will suffice.

- Set aside time for discussion. Either at the beginning or the end of the tour, set aside some time for you and possibly other key people to sit down with your guests to discuss any burning issues and go over any questions they might have.

- Send a follow-up e-mail. Send an e-mail thanking the legislator for making the visit, and use the opportunity to reinforce the points you made during the tour. If a key staff person who has oversight of your issues participated in the tour, a separate follow-up note to that person is also a good idea.

Commonly Used Titles and Job Functions of Congressional Staff

Chief of Staff

The chief of staff, sometimes referred to as the administrative assistant, handles the overall office operations, including the assignment of work and the supervision of staff. He or she reports directly to the senator or representative and usually is responsible for evaluating the political outcomes of various legislative proposals and constituent requests.

Legislative Assistant

In most legislative offices, there are several legislative assistants with responsibilities and expertise in specific legislative areas. For example, depending on the responsibilities and interests of the member, an office may include a different legislative assistant for health issues, environmental matters and taxes.

Legislative Correspondent

The legislative correspondent manages the legislator’s correspondence. He or she reads, logs and tallies letters and e-mail from constituents and flags items for the legislator’s review.

Legislative Director

The legislative director monitors the legislative schedule and makes final recommendations to the legislator regarding particular issues. In some offices, the legislative director supervises the legislative assistants.
Press Secretary or Communications Director
The press secretary is responsible for managing the legislator’s relationships with the media and the general public. He or she is expected to know the benefits, demands and special requirements of print, electronic and social media, and how to most effectively promote the member's views or positions on specific issues. Many press secretaries double as speechwriters.

Scheduler, Appointments Secretary
The scheduler is usually responsible for allocating a legislator’s time among the many demands that arise from congressional responsibilities, staff requirements, politics and constituent requests. The appointments secretary also may be responsible for making necessary travel arrangements, arranging speaking dates, visits to the district, etc.

Executive Secretary/Assistant
Executive secretaries or executive assistants often handle scheduling responsibilities as well as the day-to-day management of a legislator’s office.

District Staff
A legislator also maintains staff in his or her district or state office. It is a good idea to take the time to get to know these individuals as well, given that they may be more familiar with your organization and its role in the local community.

The district staff director is the legislator’s main point person in the district when he or she is in Washington, D.C. The district staff director reports directly to the representative about the local community and can help move along meeting requests and other information you may wish to convey to the legislator.

A caseworker is a staff member assigned to help with constituent requests by preparing replies for the member’s signature. The caseworker’s responsibilities also may include helping resolve problems that constituents present in relation to federal agencies, e.g., Social Security and Medicare issues, veteran’s benefits, passports, etc.

Commonly Used Legislative Terms and their Definitions

Act: A bill after it has passed either the House or Senate or has been enacted into law.

Amendment: A proposed change in a bill or motion, either in committee or on the floor of the legislative chamber. The Constitution can also be changed through passage of an amendment.

Authorization: A bill that creates a program and sets the amount of funding that the program should receive. The authorization to actually draw funds from the federal treasury and the amounts to be drawn are established by an appropriation.

Bill: A proposed law.

Budget Authority: Allows the federal government to incur a financial liability, typically a contract for direct payment, a loan or a loan guarantee.

Calendar of Bills: A calendar of bills, or legislative calendar, is a daily work sheet of those measures reported from committees and ready for consideration by the Senate or House.

Caucus: A meeting of the members of a political party in the U.S. Congress in which party policy on proposed legislation is discussed and refined. Caucus also can be used to define the collective members of one political party in the legislature, as in “the Oral Health Caucus.”

Conferees: Senators and representatives appointed to serve on the conference committee (see below).

Conference Committee: The House and Senate appoint conferees to a conference committee to resolve differences between House- and Senate-passed versions of the same or similar bills.

Congress: The United States legislative branch of government, consisting of the Senate and the House of Representatives. There are 100 senators and 435 representatives.

Continuing Resolution: Legislation in the form of a joint resolution enacted by Congress, when the new fiscal year is about to begin or has begun, to provide budget authority for federal agencies and programs to continue in operation until the regular appropriations acts are enacted.

Co-sponsor: One of a group of senators or representatives who introduces a bill for consideration. The initial sponsor of the bill may send a “Dear Colleague” letter asking other senators or representatives to join in sponsoring the proposal. A large number of co-sponsors increases a bill’s chances for consideration.

Cloture: The only procedure by which the Senate can vote to place a time limit on consideration of a bill or other matter, and thereby overcome a filibuster.

Federal Appropriation: A formal approval to draw funds from the federal treasury for specific purposes.

Federal Budget: The president's annual proposal to Congress, usually submitted in February, for federal expenditures and revenues for the coming fiscal year (which starts October 1).
**Federal Budget Resolution:** House- and Senate-passed guidelines, and later caps, on federal budget authority and outlays. The budget resolution is not submitted to the president for signature or veto; it is considered a matter of internal congressional rules and procedure. Bills that would exceed budget caps are subject to a point of order, although waivers have been granted regularly in both the House and Senate.

**Federal Fiscal Year:** The federal government's fiscal year runs from October 1 through September 30.

**Filibuster:** Informal term for any attempt to block or delay Senate action on a bill or other matter by debating it at length, by offering numerous procedural motions, or by any other delaying or obstructive actions.

**Hearing:** Meetings of committees or subcommittees to gather information on the ramifications of proposed legislation, investigate problems or explore issues. Witnesses present testimony and answer questions.

**Majority Leader:** The leader of the majority party in the Senate is called the majority leader. The majority leader in the House is second in command in the majority party, after the speaker.

**Mark-up:** Following hearings, members of a committee or subcommittee examine a proposed piece of legislation line-by-line to determine what additions, deletions or amendments should be made. This activity is referred to as “mark-up.” Often the chairman of a subcommittee will draft a starting proposal, referred to as the “chairman’s mark.”

**Minority Leader:** Leader of the minority party in the House or Senate.

**Omnibus Bill:** A single legislative document containing many laws or amendments.

**Point of Order:** An objection by a legislator that the pending matter or proceeding is in violation of the rules. The presiding officer accepts or rejects the objection, subject to appeal by the full House or Senate.

**President Pro-Tem:** Although no one outside the Senate refers to the vice president in this manner, he or she is the president of the Senate. The Constitution provides for a “president pro tempore” to perform the duties of senate president in the event of the president's absence. This office is filled by the majority party in the Senate.

**Report:** A printed record of a committee's actions and views on a particular bill or matter. Reports are important because they are used as guidelines in promulgating federal regulations that implement or enforce the bill if it becomes law.

**Resolution:** A resolution is a piece of legislation used to make declarations, state policies or announce decisions. Resolutions express the sentiment of the Congress but usually require no direct action by the federal government. For example, a “resolution” could be passed to commend the actions of some brave firefighters, but it would take a “bill” to award those firefighters a medal or monetary reward for their efforts.

**Select Committee:** A select committee is established by the Senate or the House for a special purpose and for a limited time. When the select committee's function has been carried out and a report made, the committee is automatically dissolved.

**Speaker of the House:** The presiding officer of the House of Representatives is the speaker of the House. The Senate does not have a speaker; that role is filled by the majority leader.

**Standing Committees:** Standing committees, as permanent units of the House and Senate, serve as the workshops of the legislature. It is their duty to carefully study all bills referred to them, reject some bills and to prepare others to be reported with a favorable recommendation from the committee.

**Unanimous Consent:** A senator may request unanimous consent on the floor to set aside a specified rule of procedure so as to expedite proceedings. If no senator objects, the Senate permits the action, but if any one senator objects, the request is rejected. Unanimous consent requests with only immediate effects are routinely granted, but ones affecting the floor schedule, the conditions of considering a bill or other business, or the rights of other senators, are normally not offered, or a floor leader will object to it, until all senators concerned have had an opportunity to inform the leaders that they find it acceptable.

**Whip:** Senator or representative who serves as an internal lobbyist for the Republican or Democratic party, persuading legislators to support the party position and counting votes for the leadership in advance of floor action.